

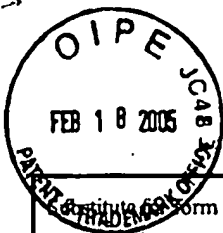
Substitute for form 1449A/PTO INFORMATION DISCLOSURE STATEMENT BY APPLICANT <i>(use as many sheets as necessary)</i>				Complete if Known	
				Application Number	09/704,838
				Filing or 371(c) Date	11-01-2000
				First Name(s) Inventor	Ronald Sloan
				Art Unit	3628
				Examiner Name	Kirsten Sachwitz Apple
Sheet	1	of	1	Attorney Docket Number	60021-375901

U.S. PATENT DOCUMENTS				
Examiner Initials*	Cite No. ¹	Document Number	Issue Date MM-DD-YYYY	Name of Patentee or Applicant of Cited Document
		Number - Kind Code ² (if known)		
TD		US-4,953,085	08-28-1990	Atkins, Charles A.

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Examiner Initials*	Cite No. ¹	Foreign Patent Document	Publication Date MM-DD-YYYY	Name of Patentee or Applicant of Cited Document	T ⁴
		Country Code ³ -Number ³ -Kind Code ³ (if known)			

NON PATENT LITERATURE DOCUMENTS			
Examiner Initials	Cite No. ¹	Include name of the author (in CAPITAL LETTERS), title of the article (when appropriate), title of the item (book, magazine, journal, serial, symposium, catalog, etc.), date, page(s), volume-issue number(s), publisher, city and/or country where published	T ⁴
Examiner Signature <i>Kirsten Apple</i>			Date Considered 7/23/00

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²Enter Office that issued the document, by the two-letter code (WIPO Standard ST.3). *For Japanese patent documents, the indication of the year of the reign of the Emperor must precede the serial number of the patent document. *Kind of document by the appropriate symbols as indicated on the document under WIPO Standard ST. 16 if possible. *Applicant is to place a check mark here if English language Translation is attached.



USPTO Form 1449A/PTO INFORMATION DISCLOSURE STATEMENT BY APPLICANT (use as many sheets as necessary)				Complete if Known	
				Application Number	09/704,838
				Filing Date	November 1, 2000
				First Named Inventor	Stephen B. Slutsky
				Art Unit	3628
				Examiner Name	Paul A. Bell
Sheet	5	of	1	Attorney Docket Number	60021-375901

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ZA	1	US-6,430,542	08-2002	Moran, William J.
	2	US-5,918,217	06-1999	Maggioncalda et al.
	3	US-5,819,263	10-1998	Bromley et al.
	4	US-6,012,043	01-2000	Albright et al.
	5			
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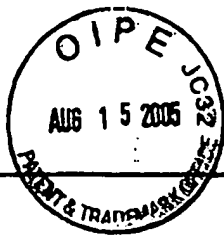
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ZD	1	"Personal financial software", The CPA Journal, New York, September 1999, Vol.69, Iss.9; pg 40, 7 pgs, Proquest, describes numbers of software packages on the market for providing automated coaching for a financial modeling.	
	2		

Examiner Signature 	Date Considered 3/3/06
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				Filing Date	11-01-2000
				First Named Inventor	RONALD SLOAN
				Art Unit	3628
				Examiner Name	Kirsten Sachwitz Apple
Sheet	1	of	1	Attorney Docket Number	060021-375901

U.S. PATENT DOCUMENTS				
Examiner Initials	Cite No. ¹	Document Number Number - Kind Code ² (if known)	Issue Date MM-DD-YYYY	Name of Patentee or Applicant of Cited Document
[Signature]		US-6,327,586	12-4-2001	Kisiel, Kenneth W.
		US-2001/0039493 A1	11-8-2001	Pustejovsky et al.
		US-2002/0161928 A1	10-31-2002	Ndili, Awele

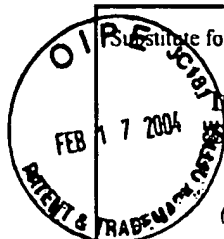
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INFORMATION DISCLOSURE STATEMENT BY APPLICANT (use as many sheets as necessary)				Application Number	09/704,838
				Filing Date	Nov-01-2000
				First Named Inventor	Sloan, Ronald E.
				Art Unit	3628
				Examiner Name	Kanof, Pedro R.
Sheet	1	of	3	Attorney Docket Number	60021-375901

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	1	4,822,647	04-1989	Nozaki et al.	
	2	5,729,700	03-1998	Melnikoff, Meyer	
	3	5,806,049	09-1998	Petruzzi, Christopher R.	
	4	5,811,055	09-1998	Geiger, Michael B.	
	5	5,852,811	11-1999	O'Shaughnessy, James P.	
	6	5,893,079	04-1999	Cwenar, Daniel	
	7	5,930,774	07-1999	Chennault, William C.	
	8	5,963,925	10-1999	Kolling et al.	
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Examiner Signature				Date Considered 3/3/06	

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Sheet

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of

3

Complete if Known**Application Number**

09/704,838

Filing Date

Nov-01-2000

First Named Inventor

Sloan, Ronald E.

Art Unit

3628

Examiner Name

Kanof, Pedro R.

Attorney Docket Number

60021-375901

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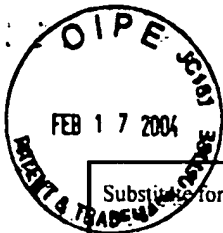
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ZA	24	JP410093729A	09-1996	Yoshikawa	
ZA	25	JP2000163030A	06-2000	HITA	
ZA	26	JP411110447A	04-1999	Kubo	
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ZA	31	ROB FANJOGY, "New design software connects colleagues", from Professional Builder, 03-01-1999			
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